Leaving SMU
Checklist for Managers

The purpose of this checklist is to assist SMU managers with the exit process when an employee is leaving the University. The employee is accountable for all assigned University property and any debt owed to SMU. If assigned property is not returned and debt not paid, collection procedures will be initiated and fees charged.

- Complete the eSeparation Form in my.SMU.edu under the Manager Self-Service Tile immediately upon notification. Please be sure to attach a copy of the resignation letter to the eSeparation Form.
  - It is essential that the eSeparation Form be submitted to Human Resources in advance of the Payroll processing dates. If for any reason submittal of the eSeparation Form will not meet payroll deadlines, please contact Human Resources immediately. Failure to do so may result in overpayment.
  - For additional information, go to Manager FAQs.

- Ensure SMU property has been returned to the department/manager.
  - SMU ID Card and Parking Decal: Employee must return to Parking and ID Card Services.
  - Library Materials: Employee must return books, videos, etc., to the appropriate library.
  - Uniforms and Tools: Employee must return to supervisor.
  - Procurement and Gas Cards: Employee must return to supervisor to be destroyed. HR will inform Purchasing that the employee has been terminated.
  - Building/Office/Desk Keys: Employee should return to Kim Currin in Dawson Service Center; she will remove key account from the system and issue a receipt.
  - Cell Phone and Pager: Employee must return to supervisor.
  - PC, Laptop, and Other Equipment: Employee must return to supervisor.

- It is essential that time reporting (i.e. Sick and Vacation leave taken and No Leave Taken -NLT) and approval of reported time be completed prior to the termination date.
  - This includes time for both the current pay period and prior pay periods.
  - If a delegate approver is responsible for this process, please be sure to advise the delegate approver of this requirement.
  - Vacation payout will not be processed if Payroll identifies any months for which time off (or Leave Not Taken) has not been reported and/or approved in Access. SMU.

- Discuss how the employee’s email will be handled. The employee can set up an auto-reply email message to let others know he/she is leaving. If supervisor needs access to the mailbox, the request must be approved by HR.

- If the employee has a long distance calling code, ensure all personal calls have been paid.

- Obtain passwords to departmental files and accounts.

- Arrange for handover of any relevant work material, including moving folders/files from the employee’s hard drive to a shared drive.

- Inform all mail list administrators to ensure that employee details are removed from mailing lists/phone lists.

- If the employee has a Procurement Card, ensure all receipts for the PC statement have been submitted.